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The Forrester Wave™: Online Testing Platforms, Q1 2013

by Joe Stanhope, February 7, 2013

KEY TAKEAWAYS

Online Testing Is Poised For A Major Expansion Beyond On-Site Experimentation

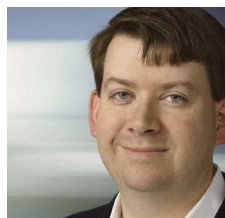
Online testing programs must follow the ongoing evolution of digital marketing to support multiple channels such as social and mobile and to optimize the full customer experience.

Vendors Are In Rapid Development Mode To Keep Pace With Growing User Needs

Online testing platform vendors are responding to expanding user requirements with support for multichannel testing, visitor profiling, advanced testing scenarios, and automation features.

Leaders Provide Broad Online Testing Functionality

All of the evaluated online testing platform vendors offer foundational campaign management and testing features, but Leaders provide extensive data handling, reporting and analysis, and integration capabilities.



The Forrester Wave™: Online Testing Platforms, Q1 2013

How Seven Vendors Are Addressing The Evolution Of Online Testing

by [Joe Stanhope](#)

with [Dave Frankland](#) and Allison Smith

WHY READ THIS REPORT

In Forrester's 53-criteria evaluation of online testing platform vendors, we identified the seven most significant providers — Adobe, Autonomy, Maxymiser, Monetate, Optimizely, SiteSpect, and Webtrends — in the category and researched, analyzed, and scored them. This report details our findings about how well each vendor fulfills our criteria, and where these vendors stand in relation to each other, to help customer intelligence professionals select the right partner for their online testing needs.

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Forrester conducted executive interviews and product demonstrations in November 2012 and interviewed or surveyed 132 enterprise customers.

Related Research Documents

[The State Of Online Testing 2011](#)

February 22, 2012

[Welcome To The Era Of Digital Intelligence](#)

February 10, 2012

[Don't Wait To Optimize Mobile Sites And Apps](#)

July 28, 2011

OPTIMIZATION IS A CORE COMPETENCY FOR DIGITAL MARKETERS

As customer interactions spread across myriad touchpoints and sophisticated consumers demand seamless and relevant experiences, marketers have been forced to reevaluate their strategies for engaging customers.¹ But the complexity, pace, and volume of modern digital marketing easily overwhelm traditional planning and design approaches that rely on historical conventions, myopic single-channel perspectives, and sequential act-and-learn iteration. How does online testing help? Online testing applies statistical techniques to compare how variations of customer experiences perform against a control group to determine the best treatment option. Online testing is appealing not only because it is efficient and measurable but also because it cuts through noise and assumptions to help marketers present the most effective content, promotions, and experiences to customers and prospects.

Maturing Vendor Solutions Offer A Glimpse Of The Future Of Online Testing

The evolving digital marketing landscape drives expanding requirements for online testing: to operate in more channels, handle more data, and support more users. Online testing must move beyond traditional on-site experimentation to fully optimize today's multifaceted digital customer experiences. This vision is entirely achievable because the underlying techniques of online testing apply to any channel or event that can be measured. In response, vendors are moving beyond standard online testing functionality — the design, execution, and measurement of experiments on websites — to deliver next-generation optimization capabilities:

- **Distributed access.** Supporting diverse — and increasingly nontechnical — participants in the online testing process requires increased emphasis on application ease of use.² A high degree of usability encourages increased testing activity by making complex functionality efficient and accessible. Online testing platforms also need enhanced administration, collaboration, and workflow functionality to support rigorous online testing processes.
- **Multichannel testing.** As customer experiences extend beyond the website to incorporate emerging channels and as marketers work to master new devices, usage patterns, and interaction types, the need for optimization is greater than ever. Online testing platforms must follow suit to support mobile websites, applications, social media, and rich media, each requiring its own experiment design, execution, and measurement capabilities.
- **Visitor profiling.** Visitor data is the common denominator between marketing and analytics applications as organizations track, analyze, and design multichannel customer interactions.³ Online testing platforms must evolve beyond siloed test management tools by incorporating the ability to collect, store, and distribute visitor data. Enhanced data support will allow users to target granular audiences, generate advanced experiments, and calculate relevant success metrics.

- **Advanced testing scenarios.** Marketers require online testing platforms to support experiments that mirror complex user experiences. Online testing platforms must advance past swapping out HTML copy and images to running experiments spanning multiple pages and domains, dynamically modifying code, and testing functional components. Users also need the ability to calculate sophisticated success metrics such as scored and continuous measurements.
- **Smarter optimization.** Managing an online testing program puts tremendous pressure on users that are already time- and resource-constrained. Online testing platforms must automate features to make testing simpler and more effective, and they need to automate core testing processes, such as the construction, validation, and execution of experiments. They must also automate analysis with proactive recommendations and segment discovery.
- **Optimization suites.** Online testing is part of a broad spectrum of optimization techniques. Online testing platforms must bring these capabilities — such as rule- and algorithm-based targeting, recommendations, and A/B and multivariate testing — together into a single offering. An integrated optimization suite enhances consistency and efficiency through a one-time implementation, a unified data layer, and single integrations with analytics and marketing tools.

ONLINE TESTING PLATFORM EVALUATION OVERVIEW

To assess the state of the online testing platform market and see how the vendors stack up against each other, Forrester evaluated the strengths and weaknesses of top online testing platform vendors.

Evaluation Criteria Focus On Growing Online Testing Requirements

After examining past research, user need assessments, and vendor and expert interviews, we developed a comprehensive set of evaluation criteria. We evaluated vendors against 53 criteria, which we grouped into three high-level buckets:

- **Current offering.** To assess product strength, we evaluated each offering against seven dimensions: campaign management; application usability and administration; data handling; testing; reporting and analysis; integration; and service and support.
- **Strategy.** We compared the product and corporate strategies of each vendor in the context of Forrester's forward-looking vision for the online testing platform market to assess how well each vendor is positioned for future success. We also incorporated quantitative client feedback as indicated by customer satisfaction and Net Promoter Score.⁴
- **Market presence.** To benchmark the relative size of the vendors' online testing businesses, we evaluated each company's financial strength, installed base of clients, and employee base. We paid particular attention to the revenue, clients, and staff that are specifically related to the vendors' online testing businesses.

Evaluated Vendors Have The Product Offering And Focus To Support Enterprise Clients

Forrester included seven vendors in the assessment: Adobe, Autonomy, Maxymiser, Monetate, Optimizely, SiteSpect, and Webtrends. Each of these vendors (see Figure 1):

- **Supports a range of online testing techniques.** To meet the varied and long-term requirements of online testing users, all vendors that made the cut offer applications that support a range of testing techniques. Specifically, each evaluated vendor offers both A/B and multivariate testing techniques or similar equivalents. Vendors that support only A/B testing were excluded.
- **Boasts an established customer base.** We sought to include vendors with an established presence in the market and a demonstrable track record with live client deployments. All evaluated vendors offer an online testing application that is currently generally available, with 50 or more customers in live production as of October 2012.
- **Has a significant base of enterprise-class clients.** This Forrester Wave™ online testing evaluation is designed to identify vendors that meet the demanding requirements of enterprise-class businesses, defined as firms with at least \$1 billion in revenue or 1,000 employees. Each vendor evaluated has at least 25 enterprise-class customers in live production, comprising a minimum of 10% of its total client base.

ONLINE TESTING VENDORS STRAIN TO BALANCE FUNCTIONALITY AND USABILITY

The evaluation uncovered a market in which (see Figure 2):

- **Maxymiser, Adobe, Autonomy, and SiteSpect lead the market.** Adobe and Autonomy both claimed leadership positions in Forrester's first online testing platform Wave and have maintained those positions with a combination of strong product offerings, solid strategy, and a substantial market presence.⁵ Maxymiser and SiteSpect — both former Strong Performers — make the jump to the Leader segment this year through incremental product enhancements, enhanced visions for optimization, and improved client reference quality. The online testing platform Leaders generally favor deep functionality over usability, although user experience design is an area of increasing priority in their product road maps.
- **Webtrends, Monetate, and Optimizely offer competitive options.** Webtrends maintains its position as a Strong Performer this year with highly robust testing capabilities. Monetate and Optimizely are new entrants in this year's Forrester Wave and are a breath of fresh air in the online testing platform market. Monetate succeeds with deep productization for eCommerce, and Optimizely maintains a laser focus on reducing the complexity of online testing for businesses of all sizes. Both Monetate and Optimizely are most notable for their commitment to application usability and deserve credit for bringing legitimate innovation to online testing user interface design.

This evaluation of the online testing platform market is intended to be a starting point only. We encourage clients to view detailed product evaluations and adapt criteria weightings to fit their individual needs through the Forrester Wave Excel-based vendor comparison tool.

Figure 1 Evaluated Vendors: Product Information And Selection Criteria

Vendor	Product evaluated	Product version evaluated	Date evaluated
Adobe	Test&Target	3.2	Q4 2012
Autonomy	Autonomy Optimost	8	Q4 2012
Maxymiser	MaxTEST	Version 6.4	Q4 2012
Montetate	TestLab	Version fall 2012, November 8 release	Q4 2012
Optimizely	Optimizely	2012	Q4 2012
SiteSpect	SiteSpect	Fall 2012	Q4 2012
Webtrends	Optimize	7.12.1	Q4 2012

Inclusion criteria

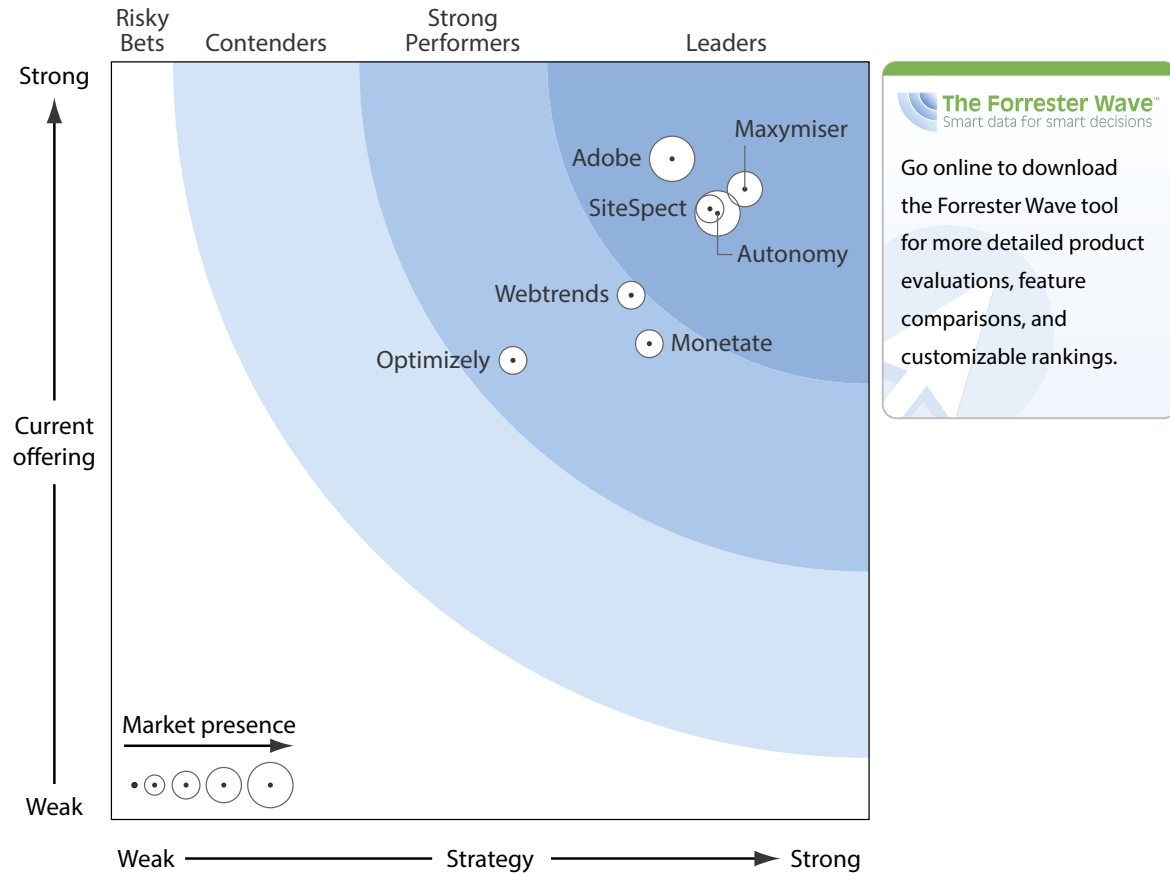
Each vendor evaluated offers both A/B and multivariate testing techniques or similar equivalents.

Each vendor evaluated offers an online testing application that is currently generally available, with 50 or more customers in live production as of October 2012.

Each vendor evaluated has at least 25 enterprise-class customers in live production, comprising a minimum of 10% of its total client base.

Source: Forrester Research, Inc.

Figure 2 Forrester Wave™: Online Testing Platforms, Q1 '13



Source: Forrester Research, Inc.

Figure 2 Forrester Wave™: Online Testing Platforms, Q1 '13 (Cont.)

	Forrester's Weighting	Adobe	Autonomy	Maxymiser	Monetate	Optimizely	SiteSpect	Webtrends
CURRENT OFFERING	50%	4.36	4.00	4.16	3.14	3.03	4.03	3.46
Campaign management	15%	4.85	4.45	4.70	4.13	3.72	4.25	3.48
Application usability and administration	20%	4.30	2.60	4.00	4.70	4.40	3.60	3.30
Data handling	10%	4.05	3.80	4.35	1.65	2.20	3.60	3.05
Testing	20%	3.88	4.75	3.88	2.00	2.00	5.00	4.81
Reporting and analysis	20%	4.20	4.00	4.20	3.00	2.60	3.70	2.70
Integration	10%	5.00	4.63	3.88	2.75	3.38	3.88	3.00
Service and support	5%	5.00	4.40	4.40	2.80	2.20	3.60	3.40
STRATEGY	50%	3.70	4.00	4.18	3.55	2.65	3.95	3.43
Product strategy	50%	3.60	4.00	4.20	2.80	2.00	4.20	3.00
Corporate strategy	25%	4.60	4.00	4.00	3.60	2.60	3.40	4.00
Cost	0%	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Quality of references	25%	3.00	4.00	4.30	5.00	4.00	4.00	3.70
MARKET PRESENCE	0%	4.19	4.50	3.40	2.51	2.59	2.19	2.56
Company financials	25%	4.00	5.00	3.70	2.70	1.00	2.00	2.60
Installed customer base	50%	4.00	4.00	2.70	2.30	3.80	2.00	2.20
Employees	25%	4.75	5.00	4.50	2.75	1.75	2.75	3.25

All scores are based on a scale of 0 (weak) to 5 (strong).

Source: Forrester Research, Inc.

VENDOR PROFILES

Leaders

- **Maxymiser.** Maxymiser was founded in the UK but exhibits a strong commitment to the US market, having gone so far as to relocate its executive management team to New York. MaxTEST exhibits consistently strong capabilities across all categories of online testing functionality, with particular depth in reporting and analysis. The company has also been aggressive in supporting testing in mobile and social channels. Maxymiser will appeal most to users that require a balance of professional services support and advanced online testing technology. To retain its leadership position, Maxymiser must execute on its vision for comprehensive optimization and visitor data management.
- **Adobe.** Test&Target is a component of Adobe Marketing Cloud, which incorporates a broad set of analytics, content management, and marketing applications. Test&Target is a solid product across all facets of online testing capability and boasts an outstanding partner ecosystem. It will appeal most to current Adobe users for its integration with popular Adobe analytics and content

management products. To retain its leadership position, Adobe must improve the ease of implementing and maintaining Test&Target and must accelerate product development to keep pace with more nimble competitors.

- **Autonomy.** Optimost is a component of Autonomy's Promote product line, which is based on the company's Intelligent Data Operating Layer (IDOL) analytics platform. Autonomy offers strong testing capabilities featuring a variety of optimized techniques and will appeal most to users with extremely advanced integration, administration, and workflow requirements. To retain its leadership position, Autonomy must overhaul its badly dated user interface, which lags the rest of the market by a significant margin, and address ongoing market uncertainty relating to its 2011 acquisition by HP.
- **SiteSpect.** SiteSpect is often associated with its unique tagless deployment model, which creates fundamental — and polarizing — differentiation from every other vendor in the market. This preconception does a disservice to users, because SiteSpect offers very strong testing capabilities. SiteSpect will appeal most to technical users that need to balance advanced testing capabilities with deployment concerns stemming from technical, security, or performance requirements. To retain its leadership position, SiteSpect must accelerate growth by improving application usability and doubling down on the benefits of its nonintrusive deployment model, particularly for testing in emerging channels such as mobile.

Strong Performers

- **Webtrends.** Optimize is a component of Webtrends' platform covering social, mobile, and web analytics. At first blush, Optimize seems less flexible than its peers, but this is a feature rather than a limitation. Webtrends applies a rigorous approach to experiment design, execution, and analysis, with the intention of providing the most statistically trustworthy approach possible. Webtrends will appeal most to users with advanced online testing requirements delivered via managed services. To remain competitive, Webtrends must reduce its reliance on professional services supported engagements with a viable self-service offering and integrate Optimize with its most innovative new suite offerings, such as the real-time Streams product.
- **Monetate.** Monetate has enjoyed a meteoric rise in the past two years, evolving from a startup into a legitimate alternative for enterprise online testing. The company is well funded and markets itself aggressively, and the product provides strong testing and targeting functionality in an easy-to-deploy and easy-to-use package. Monetate provides a highly productized offering for eCommerce and multichannel retailers and has exceptionally high client-satisfaction scores to show for it. To remain competitive, Monetate must expand its industry footprint, continue developing advanced testing features, and expand its support and services resources to keep up with customer growth.

- **Optimizely.** Optimizely is the newest entrant to the market for enterprise online testing. From humble beginnings as a cheap, no-frills A/B testing tool for the small and medium-size business (SMB) market, Optimizely now serves a substantial number of enterprises by addressing the needs of marketing-oriented users that have historically struggled to achieve testing success with more complex and costly tools. The company follows a strict ethos of simplicity as a method of democratizing online testing, and its most notable differentiator is a modern and highly intuitive user interface. To remain competitive, Optimizely must further establish its enterprise credibility, expand its professional services and support capabilities, and apply its innovative UX designs to advanced testing features.

SUPPLEMENTAL MATERIAL

Online Resource

The online version of Figure 2 is an Excel-based vendor comparison tool that provides detailed product evaluations and customizable rankings.

Data Sources Used In This Forrester Wave

Forrester used a combination of four data sources to assess the strengths and weaknesses of each solution:

- **Vendor surveys.** Forrester surveyed vendors on their capabilities as they relate to the evaluation criteria. Once we analyzed the completed vendor surveys, we conducted vendor calls where necessary to gather details of vendor qualifications.
- **Product demos.** We asked vendors to conduct demonstrations of their product's functionality. We used findings from these product demos to validate details of each vendor's product capabilities.
- **Customer reference calls.** To validate product and vendor qualifications, Forrester also conducted reference calls with three of each vendor's current customers.
- **Customer reference online survey.** To establish a level of customer satisfaction across a number of categories including product functionality, flexibility, usability, services, and support, Forrester also conducted an online survey of a minimum of 15 of each vendor's current customers.

The Forrester Wave Methodology

We conduct primary research to develop a list of vendors that meet our criteria to be evaluated in this market. From that initial pool of vendors, we then narrow our final list. We choose these vendors based on: 1) product fit; 2) customer success; and 3) Forrester client demand. We eliminate vendors that have limited customer references and products that don't fit the scope of our evaluation.

After examining past research, user need assessments, and vendor and expert interviews, we develop the initial evaluation criteria. To evaluate the vendors and their products against our set of criteria, we gather details of product qualifications through a combination of lab evaluations, questionnaires, demos, and/or discussions with client references. We send evaluations to the vendors for their review, and we adjust the evaluations to provide the most accurate view of vendor offerings and strategies.

We set default weightings to reflect our analysis of the needs of large user companies — and/or other scenarios as outlined in the Forrester Wave document — and then score the vendors based on a clearly defined scale. These default weightings are intended only as a starting point, and we encourage readers to adapt the weightings to fit their individual needs through the Excel-based tool. The final scores generate the graphical depiction of the market based on current offering, strategy, and market presence. Forrester intends to update vendor evaluations regularly as product capabilities and vendor strategies evolve.

ENDNOTES

- ¹ The customer now discovers researches, buys, and receives services across many touchpoints. Inconsistent assortments, content, promotions, pricing, policies, and capabilities will mean you are either intentionally frustrating the customer or just becoming obsolete. See the October 19, 2011, “[The Agile Commerce Platform](#)” report.
- ² Online testing technology supports the mechanical aspects of online testing such as data collection, the execution of experiments, and generating reports. But online testing programs rely heavily on the time and skills of human participants to plan, design, and analyze a pipeline of experiments. See the August 10, 2010, “[Organizing For Site Optimization](#)” report.
- ³ To close the gap between web analytics and comprehensive analytics for digital marketing, customer intelligence (CI) professionals must adopt an updated approach. Forrester calls this “digital intelligence,” defined as “the capture, management, and analysis of data to provide a holistic view of the digital customer experience that drives the measurement, optimization, and execution of marketing tactics and business strategies.” See the February 10, 2012, “[Welcome To The Era Of Digital Intelligence](#)” report.
- ⁴ Net Promoter, Net Promoter Score, and NPS are registered trademarks of Bain, Fred Reichheld, and Satmetrix Systems. Source: Bain (<http://www.bain.com/search.aspx?q=Net+Promoter>); Satmetrix Systems (<http://www.satmetrix.com/>).
- ⁵ Forrester’s first online testing platform Wave was published just over two years ago. See the August 13, 2010, “[The Forrester Wave™: Online Testing, Q3 2010](#)” report.

About Forrester

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« CHARLES IBRAHIM, client persona representing Customer Intelligence Professionals

